



**TOWN OF LINCOLN, RHODE ISLAND
INVITATION TO BID
2015 STATISTICAL REAPPRAISAL
OF TAXABLE REAL PROPERTY
RFP #2015-11**

Proposals are being requested to provide for the **Statistical Reappraisal of Taxable Real Property**, in accordance with all terms and specifications contained herein, will be received in the Finance Department, Lincoln Town Hall, 100 Old River Road, Lincoln, Rhode Island, 02865 until:

January 30, 2015 – 10:00 AM, Eastern Standard Time

Proposals must be submitted in sealed envelopes addressed to the Finance Director, Lincoln Town Hall, 100 Old River Road, Lincoln, Rhode Island 02865, and must be plainly marked in the lower left hand corner, **“2015 Statistical Reappraisal Services”**.

It is the proposer’s responsibility to see that the bid is delivered within the date, time, and at the place prescribed. Proposals received prior to the time of opening will be securely kept, unopened. Proposals may be withdrawn on written request (on the letterhead of the proposer and signed by the person signing the proposal) which must be received prior to the time fixed for opening. Proposals may be modified in the same manner. No proposal or modification thereof received after the time set for opening will be considered, even if it is determined by the Town that such non-arrival before the time set for opening was due solely to the delay in the mail for which the proposer is not responsible. All proposers are responsible for insuring that no **addendums** have been made to the original Request for Proposals package.

Any proposer taking exception to, or questioning any of the provisions, procedures, conditions or specifications herein stated should make such exceptions known to the undersigned, in writing, not less than ten (10) business days before the proposal opening.

Any change or interpretation made as a result thereof will be published in an addendum and posted on the Town’s website. Should a proposer still not be satisfied, he may, in the proposal, set out and stipulate the exception, with enough explanation to be understood by the Town and, within the stipulation, the INCREASE or DECREASE in the proposal price because of the exception shall be stated. The Town may, at its discretion, accept or reject any or all exceptions.

Federal Excise Taxes and/or Rhode Island Use Taxes are not to be included in the proposal as the Town of Lincoln is exempt.

The proposer will state the approximate delivery date in the bid, or the time required to make delivery after notification of award.

The right is reserved, as the interest of the Town may require, to reject any or all proposals, to waive any technical defect or informality in proposals received, and to accept or reject any proposal or portion thereof.

The Town of Lincoln reserves the right to reject any or all proposals or to accept any proposals deemed to be for the best interest of the Town.

The technical point of contact for this package is Elaine Mondillo, Tax Assessor, at (401) 333-8448, Email: emondillo@lincolnri.org

GENERAL CONDITIONS

1. The Town reserves the right to reject any and all proposals, to waive any informality, to request interviews of proposer prior to award and to select and negotiate the proposed services in the best interest of the Town.
2. The proposer shall guarantee to perform the services offered and the total price of the proposal for a period of not less than 90 days from the deadline for submission of proposals.
3. The Town reserves the right to accept all or part of any proposal, and to negotiate a contract for services and cost with the selected proposer.
4. The proposer shall provide all necessary personnel, materials and equipment to perform and complete all work under this proposal.
5. All original documents and drawings shall become the property of the Town after completion of the proposer's work.
6. The Town of Lincoln intends to recommend award of a contract to the Town Council for the requested services within one (1) month of receipt of the proposals. The proposer shall be prepared to commence work immediately upon execution of a contract with the Town.
7. Awards will not be made to any person, firm or company in default of a contract with the Town, the State of Rhode Island or the Federal Government.
8. The proposer hereby agrees that it will assign to the Town of Lincoln all cause of action that it may acquire under the anti-trust laws of Rhode Island and the United States as the result of conspiracies, combination of contracts in restraint of trade which affect the price of goods or services obtained by the Town under this contract if so requested by the Town of Lincoln.
9. Unless otherwise stated, invoices are to be submitted to the Tax Assessor upon delivery of service to the Town. The invoice must include an itemization of all services provided, including unit list price, net price, extensions, percentage of completion and total amount(s) due.
10. Unless otherwise stated, payment will be made within thirty (30) days of the receipt of invoice for the completion of the service to the satisfaction of the Tax Assessor.
11. Town is exempt from all sales and Federal excise taxes. Please bill less these taxes.
12. The Town of Lincoln's obligations to pay any amount due under a contract are contingent upon availability and continuation of funds for the purpose. The Town may terminate the contract, for non-appropriation of funds, and all payment obligations of the Town cease on the date of termination.
13. None of the services covered by the contract shall be assigned in full or in part, or sub-contracted without the prior approval of the Town.
14. This contract will be for the services described herein; however, this agreement should not be considered exclusive. As deemed necessary, the Town reserves the right to obtain these services from any other vendor.
15. Unless otherwise specified all costs listed are firm for the term of the contract.

16. Neither party shall be liable for any inability to perform its' obligations under any subsequent agreement due to war, riot, insurrection, civil commotion, fire, flood, earthquake, storm or other act of God.
17. Notification of the parties shall be considered to have been constructively received when it is mailed via the United States Postal Service or delivered in hand to the parties as stated in the contract.
18. If any of the GENERAL TERMS AND CONDITIONS is held to be invalid or unenforceable, it will be construed to have the broadest interpretation which would make it valid and enforceable under such holding. Invalidity or unenforceability of a term or condition will not affect any of the other GENERAL TERMS AND CONDITIONS.
19. Each and every provision and clause required by law to be inserted in any subsequent Contract shall be deemed to be inserted herein and the Contract shall be read and enforced as though it were included herein, and if through mistake or otherwise any such provision is not inserted, or is not correctly inserted, then upon the application of either party, the Contract shall forthwith be physically amended to make such insertion or correction.
20. Proposal shall also mean quotation, bid, offer, qualification/experience statement, and services. Contractors shall also mean vendors, offerors, bidders, or any person or firm responding to a Request for Proposals.
21. All contracts entered into by the Town of Lincoln shall be governed by the Laws of the State of Rhode Island. Any disputes shall be resolved within the venue of the State of Rhode Island and Providence County.
22. The Service Provider selected for this project shall procure and maintain the following types of insurance:
 - Statutory Workers Compensation and Employer's Liability Insurance.
 - Professional Services Liability Insurance for errors and omissions (\$1,000,000.00 minimum).
 - Liability and Property Damage Insurance including Bodily Injury.

TECHNICAL POINTS OF CONTACT

Any questions regarding this package or scheduling of a site visit may be directed to Elaine Mondillo, Tax Assessor at (401) 333-8448.

REQUEST FOR PROPOSALS FOR THE
STATISTICAL REAPPRAISAL OF REAL PROPERTY
LOCATED WITHIN THE CORPORATE LIMITS OF LINCOLN, RHODE ISLAND
Effective December 31, 2015

The Town of Lincoln, RI is undertaking a program to perform a Statistical Reappraisal of all Real Property (the Project) effective December 31, 2015. Companies or individuals interested in providing the Revaluation Services set forth in the Specifications outlined herein below are invited to deliver three (3) copies of the proposals to the Finance Department, Lincoln Town Hall, 100 Old River Road, Lincoln, Rhode Island 02865 no later than January 30, 2015, at 10:00 a.m.

The proposals will be opened at 10:00 a.m. on January 30, 2015. The names of the proposers and the dollar amounts will be announced at the next scheduled Town Council Meeting.

The Town reserves the right to award the bid to the firm offering the lowest qualified evaluated bid or to reject any or all bids, and to waive any informality.

All proposals shall be sealed, addressed to the Finance Director and marked:

“2015 Statistical Reappraisal Services”

All information pertaining to the proposer's technical and management approach to completing this Project, as well as the proposed cost, timetable and staffing plan shall be presented in the proposal. The proposal must address, at a minimum, each of the issues set forth in this Request for Proposals in order to be considered responsive. Any proposal which does not respond to each issue in the Request for Proposals may be rejected by the Assessor as non-responsive.

The Assessor reserves the right to amend this proposal at any time prior to the deadline for submission of proposals.

The Town currently utilizes Certified Revaluation Company's CAMA Software. Any proposer who intends to bid on this project shall demonstrate their proposed CAMA software to the Assessor prior to January 30th at a date and time acceptable by the Assessor.

Any CAMA software installed must carry a three (3) year support contract and up to 40 hours of software maintenance/customization programming, inclusive in the proposed bid.

The proposer must also include and provide a website that is accessible to the public to perform research/searches of all town properties including tax exempt parcels that include at a minimum; Owner's Name, Location, typical assessment data, and Final Assessment. The proposer shall include their internet solution as a part of their proposal that is for a three (3) year term, inclusive in the bid proposal.

In addition to addressing each of the items in the Specifications, the proposer must submit, as part of its proposal, the following information:

1. A Letter of Transmittal signed by the individual authorized to negotiate for and contractually bind the proposer stating that the offer is effective for at least ninety (90) Calendar Days from the deadline for the submission of proposals.
2. A list of Municipalities for which the proposer has completed Revaluation Programs since 1999. Note each project as either a “Full” or “Statistical Update” Revaluation.

3. A list of Revaluation Contracts for which the proposer is currently committed.
4. A listing of Revaluation projects the proposer is considering bidding on that will be effective as of 12/31/2015.
5. Listing of Municipalities where the proposer has utilized and/or converted Certified Revaluation's CAMA software.
6. Description of proposer's public relations program that would be used during revaluation. At least one public informational seminar must be offered.
7. Bond or certified check for ten (10) percent of the proposal submitted.

SPECIFICATIONS

DEFINITIONS

- A. Assessor: The word "Assessor" shall mean the duly appointed Assessor of the TOWN OF LINCOLN.
- B. Project: The word "project" shall mean Statistical Reappraisal and Revaluation of all Real Property in the TOWN OF LINCOLN for tax assessment purposes.
- C. TOWN: The word "TOWN" shall hereinafter mean the TOWN OF LINCOLN, RHODE ISLAND
- D. CONTRACTOR: The word Contractor shall hereinafter mean the proposer responsible for performing the project herein described, as awarded.

SCOPE OF STATISTICAL UPDATE

- E. Basic Scope: CONTRACTOR understands that the project requires the complete Statistical Reappraisal and Revaluation of all Taxable and Exempt Real Property within the Corporate Limits of the Town of Lincoln, Rhode Island. All work for the project shall be in accordance with these contract specifications.

All work will be carried out and all forms, materials and supplies utilized by CONTRACTOR in this project shall conform to, and be carried out in accordance with, the Rhode Island General Statutes, the Division of Municipal Finance regulations and/or specifications, and shall be subject to direct supervision and approval of the Assessor.

The values to be determined by CONTRACTOR shall be the full fair market, as defined in Rhode Island General Statutes and shall be based upon nationally recognized methods of appraising. Farm, Forest, and Open Space properties will be valued under the most recent law/regulations. Project must meet or exceed standards for reappraising property as defined by the State of Rhode Island and the International Association of Assessing Officers (IAAO).

CONTRACTOR'S statistical revaluation program will cover and include all property in the TOWN OF LINCOLN in the following categories:

REAL PROPERTY: All taxable real estate, land, buildings and improvements, as well as exempt properties. Tax Sale properties are considered taxable.

TANGIBLE PERSONAL PROPERTY is not included in this Revaluation.

- F. Effective Date: The effective date of this revaluation project shall be on the Assessment Date of December 31, 2015 and the pricing and valuation by CONTRACTOR of all land, buildings and property under this contract shall reflect a fair market value as of December 31, 2015.

- G. Parcel Count:

CONTRACTOR'S price for the revaluation is based upon the following anticipated parcel counts:

State Code Summary

TOWN OF LINCOLN, RI

Real Estate Accounts

<i>Code</i>	<i>Description</i>	<i>Count</i>	<i>Assessment</i>
01	1 Fam	5154	\$1,471,216,200
02	2- 5 Fam	791	\$147,831,400
03	Apartments	55	\$44,973,900
04	Combination	49	\$15,089,400
05	Comm I	4	\$1,497,000
06	Comm II	131	\$310,574,700
07	Industrial	114	\$110,046,900
10	Utility and Railroad	42	\$6,010,000
11	Seasonal and Beach Property	1	\$114,400
12	Improved - Other	34	\$2,009,400
13	Vac - Res	473	\$22,960,000
14	Vac - C/I	97	\$9,555,800
15	Vac - Other	5	\$432,700
23	Condo - Res	894	\$122,174,900
24	Condo - Comm	73	\$74,595,700
25	Condo - Ind	2	\$355,900
27	Condo - Main Parcel	42	\$4,700
33	F F & O	10	\$2,952,500
70	Cemeteries	10	\$28,000
71	Charitable	3	\$1,283,900
72	Church	25	\$24,069,300
73	Ex-Charter	24	\$6,326,000
74	Federal	9	\$10,876,700
76	Libraries	1	\$1,887,700
78	Municipal	203	\$20,830,600
79	School	10	\$74,601,700
80	State	71	\$75,379,300
81	Tax Sale	37	\$1,093,300
82	Vote of City	6	\$1,325,700
97	M Home	63	\$2,946,800
98	Comm/Lease Land	2	\$2,188,700

TOTAL: \$2,565,233,200

COUNT: 8435

The counts presented here shall be considered an estimate only. Contractor is responsible for the revaluation of all property/parcels located within the corporate limits of Lincoln, RI.

Contractor will be responsible for the valuation of any new subdivision of land AND new construction.

Current basis of assessment is 100%.

The last revaluation was effective as of December 31, 2012.

The area of the TOWN is 19 +/- square land miles.

BUILDING PERMITS ISSUED

<u>TYPE</u>	<u>2011</u>	<u>2012</u>	<u>2013</u>	<u>2014</u>
Electrical	350	409	395	515
Demolition	15	10	10	15
Building	489	467	437	475
Mechanical	227	261	253	342
Moving	1	0	0	0
Plumbing	144	140	137	205
Sign	0	0	0	0
New Homes	29	12	53	53

HARDWARE/OS: Virtualized environment on HP servers running Microsoft Windows Server 2008

SOFTWARE: Tax Admin is Opal/Vision

PERSONNEL AND OFFICE HOURS

- H. Personnel: CONTRACTOR shall provide experienced and qualified personnel, as hereinafter provided, and will comply with the requirements of the equal employment opportunity provisions of federal and state governments. CONTRACTOR shall submit to the TOWN written qualifications of all personnel assigned to this project.
- I. Qualifications of Personnel: Contractor will comply with Rhode Island certification standards and the qualifications standards set forth in this Request for Proposal for all personnel assigned to this project. All personnel will be subject to the approval of the Assessor, which approval shall not be unreasonably withheld or delayed, and shall be caused to be removed from this project by Contractor upon written recommendation of the Assessor, specifying in detail the reasons for the recommendations. Personnel shall meet the following minimum qualifications:

Project Manager/Supervisor: Shall have at least five (5) years of experience in the management of a revaluation project and hold a current Rhode Island Certified General Appraiser license or similar designation from another state. A copy of the license must be presented within the bid packet.

Reviewers and Appraisers: Shall have no less than three (3) years of experience in the appraisal of residential and commercial real estate for revaluation purposes. It is required that the Commercial/Industrial reviewer hold a Rhode Island Certified General Appraiser license or equivalent.

Data Collectors: Shall have worked on at least one full property revaluation project and have at least two (2) years of revaluation experience. Any person not meeting this standard must be approved by the Tax Assessor and shall have direct supervision by a reviewer, appraiser, or the project manager. Minimum age for a data collector shall be twenty-one (21) years of age.

The contractor shall give all Data Collectors clear and unequivocal instruction that they shall not discuss with any property owner or occupant of the Town the value assessment of any property, nor shall they discuss any budget, fiscal items, taxes being paid, or political issue.

- J. Identification: All Contractor field personnel shall carry suitable identification cards, which shall include an up-to-date photograph. ID Cards will be furnished by the TOWN. All automobiles used by Contractor's field personnel shall be registered with the Town of Lincoln's Police Department, providing: license number, make, model, year and color of the vehicle. All personnel will be subject to a background check prior to issuance of ID Card. Magnetic exterior or dashboard signs for vehicles may be requested to be used by the Contractor for identification.
- K. Office area may be provided by the Town if necessary.
- L. Conflict of Interest: No TOWN employee shall be employed by Contractor without the approval of the Assessor.

PROTECTION OF THE TOWN

- M. Bonding: Contractor will secure the faithful performance of the terms of this agreement by furnishing to the TOWN a performance surety bond in the amount of this contract, which bond shall be issued by a reputable bonding company licensed to do such business in the State of Rhode Island. Said bond shall be delivered to the TOWN prior to the commencement of actual work and shall be in a form satisfactory to and approved by the TOWN'S attorney.
- N. Insurance: Contractor will, at its own expense, provide and keep in force:

Workers Compensation Insurance:

(Per Rhode Island Law) and Employer's Liability Coverage, Coverage A at statutory limits and Coverage B at limits of \$100,000/\$500,000/\$100,000.

Broad Form Commercial General Liability Coverage:

Which names the TOWN as an additional insured, written on a 'per occurrence' basis and with an aggregate cap no less than three (3) times required limit: \$2,000,000 Combined Single Limit (C.S.L.).

Automobile Liability Coverage:

Including coverage for owned, hired or borrowed vehicles, \$2,000,000 Combined Single Limit (C.S.L.).

Defense of TOWN:

All insurance companies shall have the duty to defend the TOWN against liability or property damage claims arising from the conduct of Contractor and/or agents or employees.

Insurance Certification:

An Insurance certificate shall be required to be filed with the TOWN, certifying coverage and limits of automobile, bodily injury liability, property damage liability and Worker's Compensation.

“The TOWN is named as Additional Insured on the Insurance coverage named herein for the claims arising out of the COMPANY’S performance of the contract herein”.

- O. Patent/Copyright Liability: Contractor shall save the TOWN harmless from any liability of any nature or kind, including costs and expenses for, or on account of, any patented or copyrighted equipment, materials, articles or processes used in the performance of the contract.
- P. Penalties: Failure by Contractor to complete all work prior to the date specified herein, April 15, 2016, shall be cause for a penalty payment by Contractor in the amount of One Hundred Dollars (\$100.00) per day beyond the specified date of completion, provided the TOWN timely meets its responsibilities. For the purposes of this penalty only, completion of all work not later than April 15, 2016 is defined as follows:

Completed property record cards with all sketches, photographs, measurements, listings, pricing, review and final valuations.

All hearings completed and final assessments notices mailed.

This penalty, if applied, shall be deducted from the contract price. Delays occasioned by war, strike, explosion, acts of God or an order of court or other public authority are excepted.

- Q. Bankruptcy, Receivership, Insolvency: If Contractor, with the result that it does not pay its debts as they become due, or if a receiver shall be appointed for its business or its assets and not voided within 60 days, or if interest herein shall be sold under execution or if it shall be adjudicated insolvent or bankrupt, then and forthwith thereafter, the TOWN shall have the right, at its option and without prejudice to its rights hereunder, to terminate the contract.
- R. Termination: If either party fails to fulfill in a timely and satisfactory manner their obligations under this agreement, or shall violate any of the covenants, conditions or stipulations of this agreement, which failure or violation shall continue for 30 days after written notice of said failure or violation is received by the offending party, unless the correction of such failure inherently requires a longer period of time and provided further that the applicable party is proceeding diligently to correct the failure, then the opposing party shall thereupon have the right to terminate this agreement by giving written notice to the offending party of such termination and specify the effective date thereof, at least seven (7) days before the effective date of such termination.

In the event of termination, all finished work and documentation, complete and incomplete, shall, at the option of the ASSESSOR, be delivered to the Town. Contractor shall be entitled to the release or partial release of the performance bond and to receive just and equitable compensation for any work performed under this agreement completed prior to the date of termination.

Notwithstanding the above, in the event of termination, neither party shall be relieved of liability by virtue of its breach of this agreement.

- S. Hold Harmless Agreement: Contractor shall, at all times , defend, indemnify, protect and save harmless, the TOWN and its officers, agents and employees from any and all claims or demands for damage for bodily injury, including death or property damages sustained by any party, including officers, agents and employees of Contractor. Said hold harmless clause shall include, but not limited to investigation, defense and settlement or payment or judgment of any liabilities.
- T. Severability: In the event any part of any clause or provision of this contract or contract specifications is judicially determined to be unenforceable, it shall be deemed severable from the remainder of that clause or provision and such remainder shall be binding upon the parties to this contract.

- U. Waiver: No action or failure to act by the TOWN shall constitute a waiver of any right or duty afforded it under the contract or contract specifications nor shall it prohibit the TOWN from future exercise Plot Plans of any such right.
- V. Misrepresentation or Default: The TOWN may void this agreement if Contractor has misrepresented any offering or defaults on any contract with any Rhode Island municipality, or any other state. Contractor shall, also, immediately notify the TOWN of any claim or case formally brought against Contractor.

COMPLETION DATE AND TIME SCHEDULE

- W. Signing of Contract: Within 30 days after receipt of notice of acceptance by the TOWN of its bid, as possibly revised by negotiations, Contractor shall execute with the TOWN a contract in the form agreeable to the TOWN and incorporating these contract specifications.

- X. Changes and Assignment of Contract:

Changes: Contractor understands that changes in these contract specifications or in the contract will be permitted only upon written mutual agreement of Contractor and the TOWN.

Assignment: Contractor shall not assign and/or transfer the contract or any interest or part therein without first receiving written approval from the TOWN. It shall be mutually agreed and understood that said consent by the TOWN, shall in no way release Contractor from any responsibility as covered in these contract specifications and contract.

- Y. Time Schedule: The revaluation work will be started; provided the Town delivers maps, present records with owner's addresses, property transfers and building permits at the convenience of Contractor, but no later than March 15, 2015 and will continue in a diligent manner so as to ensure completion within the schedule of completion dates set forth below:

Completion Dates: Contractor will complete the following phases of the revaluation in accordance with the following schedule:

- Conversion of CRC CAMA system to the supplied CAMA system by May 16, 2015 or any other date town designates after May 16. This is for Tax Assessor use/testing.
- Complete land study and set values by December 31, 2015.
- Complete building cost manual by December 31, 2015.
- Full Field Review Completed by January 29, 2016.
- Complete study of market rents, expenses, and capitalization factors by December 31, 2015.
- Deliver completed CAMA database, integration of CAMA software, digital images. Real Estate Property cards with sketches, measurements, listings, pricing, and recommended assessments to the Assessor by January 29, 2016.
- Revised assessments posted to database from Assessor after she completes review and final adjustments made for real property no later than February 29, 2016.
- Assessment notices mailed on/or about February 23, 2016. (Contractor to pay postage)

- Informal hearings will begin no later than March 1, 2016 and end by March 21, 2016. The Contractor Completes all Field Work resulting from hearings before March 31, 2016.
- Notices of results finalized after the informal hearings are to be mailed out, computer file is updated and final property record cards printed (2 sets in color) no later than April 15, 2016.
- Final assessment values presented to the Assessor no later than April 15, 2016.

Z. Assessment Date: The completed appraisals, upon approval of the Assessor, will serve as a basis for assessments, effective December 31, 2015.

ZZ. The following properties have Agreements with the Town. The assessments are frozen; however, assessment must be provided to the Assessor to be utilized prior to the next revaluation. The Assessments will be provided to the Assessor but not included in the CAMA database. The properties are as follows:

Plat	Lot	Owner of Record
42	024.0	UTGR INC
30	060.0	Amica Mutual Insurance
31	013.0	Amica Mutual Insurance
31	014.0	Amica Mutual Insurance
31	072.0	Amica Mutual Insurance
31	168.0	Amica Mutual Insurance
31	173.0	Amica Mutual Insurance
31	174.0	Amica Mutual Insurance
31	175.0	Amica Mutual Insurance
31	176.0	Amica Mutual Insurance
31	177.0	Amica Mutual Insurance
31	178.0	Amica Mutual Insurance
31	198.0	Amica Mutual Insurance

PAYMENT SCHEDULE

AA. Periodic Payments: Payments shall be paid in the following manner: 30 days after the execution date of this contract and at the end of each 30 day period thereafter covered by this contract, Contractor will certify, by written progress report to the Assessor, the percentage of total work completed during the said 30 day period. The TOWN will review each report and within ten business days of receipt, either approve it for payment or return it to Contractor with a written statement of reasons for its rejection. Upon determination by the Assessor that Contractor's work during said period is accurate, the Town will pay Contractor a percentage of the total contract price equal to the percentage of work performed less 10 percent, which is to be retained by the TOWN to ensure full and satisfactory performance of the contract.

If the Assessor determines that Contractor's progress report is inaccurate, the Assessor shall give written notice as stated above, specifying exactly what is unsatisfactory by item, and Contractor shall make every reasonable attempt to correct the inaccuracy. The Assessor shall retain the right to delay payment, only for the specified item, until said item is resolved to the satisfaction of both the Assessor and Contractor. Upon satisfactory resolution, the Assessor shall pay Contractor said amount due, less 10 percent.

Upon completion of the duties by the Assessor and certification by the Assessor that Contractor has performed fully and satisfactorily all its obligations and requirements under the contract and/or

contract specifications, the retained 10 percent of the contract price will be paid to Contractor, less any penalties (if any).

BB. Suggested Schedule and Percentage of Completed Work:

The Schedule is to be provided by the Contractor and approved by the Assessor.

% OF TOTAL STAGES OF COMPLETION PROJECT COST

- Planning & organization
- Data Conversion
- Residential analysis and valuation
- Condominium analysis and valuation
- Commercial/Industrial analysis and valuation
- Field review
- CAMA Software Installation
- Informal Hearings Notices & Interviews
- Project finalization
- TOTAL

RESPONSIBILITIES OF CONTRACTOR

CC. Public Relations: Contractor recognizes that good public relations are required in order that the residents and taxpayers of the TOWN may be informed as to the purpose, benefits and procedures of the revaluation program. Contractor shall provide reasonable assistance to the Assessor in conducting a program of public information through the press and other media, such as meeting with citizens, service clubs and property owner groups as a means of establishing an understanding of, and support for, the revaluation program and sound assessment administration. Contractor shall supply visual aids and other media at its disposal to this end. All public releases will be approved by the Assessor prior to its release.

DD. Conduct of Contractor Employees: As a condition of this contract, Contractor's employees will, at all times, treat the residents, employees and taxpayers of the TOWN with respect and courtesy; Contractor shall take appropriate and meaningful disciplinary measures against those who violate such terms of this provision.

EE. Records:

General Provision: Contractor will provide all record cards, street cards, owner cards, supplies, equipment, forms, literature and papers to be used in this project at no additional cost to the TOWN.

Additional Supplies: All forms shall be subject to approval by the Assessor as to format, design, content, shape, size, color, quality and quantity.

Records are TOWN'S Property: The original or a copy of all records and computations, including machine-readable database, made by Contractor in connection with any appraisal of property in the TOWN shall, at all times, be the property of the TOWN and, upon completion of the project or termination of this contract by the TOWN, shall be left in good order in custody of the Assessor. Such records and computations shall include, but not be limited to:

- Tax maps
- Land value maps
- Materials and wages, cost investigations and schedules
- Property Record Cards with final valuations and separate sketch cards, (if any)
- Sales data
- Capitalization rate data
- Depreciation tables
- Computations of land and building values
- All forms of correspondence including letter or memoranda to individuals or groups explaining methods used in appraisals
- Operating statements of income properties
- Duplicate of hearing determination notices
- Duplicate notice of change.
- All software and documentation for the complete operation of the CAMA System.

Assessor's Records: Contractor will use a system approved by the Assessor for the accurate account of all records and maps which may be taken from the files of the Assessor in connection with appraisal work. All such records and maps shall be returned immediately. None of the Assessor's records shall be taken outside of the corporate limits of the TOWN without prior written permission of the Assessor. The Assessor will permit Contractor to access all residential building sketches from earlier revaluation field cards together with the outside dimensions of all auxiliary buildings such as garages, barns, sheds and swimming pools if deemed accurate. Contractor will be permitted to access all commercial and industrial information presently outlined on existing Assessor's field cards if deemed accurate.

Property Record Cards: At the completion of this project, the Contractor shall print out 2 full sets of property record cards with the updated values for Assessor use only. These sets of PRCs shall be printed on the Contractor's office machinery.

- Property Record Card (PRC) design/layout must be approved by the Assessor and Contractor will make any and all reasonable changes to their pre-designed PRCs to the satisfaction of the Assessor.

Valuation Information (Property Record Cards): These cards shall contain all manner of information affecting value, including, but not limited to, information as to location of property, classification as to usage, owner of record, source of title, size, shape and physical characteristics of land, with the breakdown of front feet, square feet or acreage as applicable, along with unit of value applicable to each, public utilities available, public improvements, zoning regulations in effect as of the assessment date.

Sketches: Contractor will sketch all physical improvements, giving a listing of all interior and exterior construction details, quality of construction, age, condition, replacement values, percent of physical and functional depreciation, depreciated values, fair market value. Sketches of buildings, including dwellings, shall be drawn to scale with dimensions given on the street card.

CAMA System: Must be able to import and export data into the Vision (Opal) Tax Administration and Building Officials Software Systems. The import/export files must be able to update ownership information from CAMA to the Building Official, and Permit information from Vision's Building Official Software to the proposed CAMA system. The proposed CAMA software must be able to export all information required to prepare a tax billing file to the Vision Tax Administration software. Specifications are available upon request.

FF. Assessment Notices: At the close of the revaluation, a notice shall be sent, at Contractor's expense including envelope by First Class Mail, to each owner of record, setting forth the valuation that has been placed upon the property identified in the notice. Further, enclosed with such notice shall be a

letter specifying the dates, times and place of the informal public hearings. Such notices and letters shall be subject to the prior written approval of the Assessor.

GG. Informal Public Hearings: At a time mutually agreeable to the Assessor and Contractor, but following completion of all review work by the Assessor and Contractor, Contractor will hold informal public hearings at such times and at such locations as the Assessor may specify so that owners of real and personal property, or their legal representatives, may appear at specified times to discuss with qualified members of Contractor's staff the manner and methods of arriving at value. Informal public hearings, at the Assessor's discretion, may be held on weeknights and Saturdays.

Contractor will provide a sufficient number of qualified personnel to handle said hearings expeditiously and fairly. Any information offered by the taxpayer shall be given consideration and adjustments shall be made where warranted. The public hearings shall be completed by March 21, 2016.

Contractor will provide person(s), or their legal representative, who appear(s) at a hearing, a form indicating whether or not Contractor will re-inspect the property(s) being questioned. Such decision to re-inspect will be at the reasonable discretion of Contractor. Any such re-inspection shall be made as soon as possible. This form shall be approved by the Assessor and provided by Contractor. Form shall also alert the resident as to when they can expect a follow-up notice. The completed and signed forms shall be turned over to the Assessor at the conclusion of the hearings. Contractor will, at its own expense by First Class Mail, notify each taxpayer who has appeared at an informal public hearing of the results of that hearing as soon as the results are determined, and the form of such notices shall be subject to the prior expressed approval of the Assessor.

HH. Board of Assessment Review: Contractor will have a qualified member or members of its staff with first hand knowledge of the project and Contractor's duties under the contract, available upon request, for attendance at any hearings or deliberations of the Board of Assessment Review held after the completion of the revaluation, Sunday's excluded, to assist in the settlement of complaints and to explain the valuations made; but such availability and attendance shall not be required after the date for the completion of the duties of the Board Assessment Review with respect to the December 31, 2015 Grand List, or for one complete calendar year beyond completion of the revaluation, whichever comes first.

Contractor shall provide the Assessor's Office 2 sets of bound books containing the PRCs of all sales utilized in the course of this project. Sales shall be arranged by State Class Code, Style of Structure, then by square footage. PRCs are to be printed in color on 28lb paper stock.

II. Litigation: In the event of appeals to the courts, Contractor will furnish a competent witness/witnesses with first hand knowledge of this project and Contractor's duties under the contract to defend the valuation of the properties appraised; it being understood that Contractor shall furnish said witness/witnesses on any court action for 5 days at no charge, after the initial 5 days, a per diem rate of \$500.00 will be charged. Contractor will provide supporting data, including written appraisals if deemed necessary by the Assessor, for any said court appeals. Contractor will also comply with any request by the TOWN to answer any interrogatories, provide witnesses for depositions or to otherwise participate in the discovery process pertaining to any litigation described in the first sentence in this paragraph.

Contractor shall not be held responsible for any assessment that has been increased by the Assessor for reasons other than new construction/permit work that utilized the Contractor's building cost tables.

JJ. Building Cost Schedules:

General: Contractor will prepare building cost schedules for usage in the program hereinafter specified. These schedules will reflect the unit-in-place method, based upon square foot or cubic

foot area of building, as applicable. These schedules shall be used in computing the replacement cost in the TOWN for all residential, commercial, industrial and farm construction. They shall reflect the wage scale for the various trades, labor efficiencies, overhead, profit, engineer and architect fees, and all other direct and indirect costs of construction. Before final acceptance, they shall be proven by testing against known sales. All finalized schedules shall be approved by the Assessor before their adoption and usage by Contractor.

Residential: Residential cost schedules will include schedules for various classifications, types, models and story heights normally associated with the residential buildings. The schedule will be flexible, with special sections reflecting the various additions and deductions for construction components from the base specifications such as insulation, wall and floor types, interior finish, etc., along with prices for different types of heating systems, bathrooms, fireplaces, porches, breezeways, attached and unattached as well as basement garages, and schedules for other building improvements usually found on residential property (swimming pools, barns, sheds, garages, tennis courts, greenhouses, solar designed, etc.)

Commercial: Commercial building cost schedules shall be prepared in unit costs of materials in place and charted on a per square foot basis and shall be prepared for various story heights and contain all additions and deductions for construction components from base specifications.

Industrial and Special Structures: Cost schedules for industrial and special purpose structures shall be prepared in unit costs of material in place and charted on a per square foot basis , and shall be prepared to contain all the additions and deductions for construction components from base specifications.

Farm: Cost schedules for farm structures shall be prepared for square foot and cubic foot costs for various types of farm buildings including, but not limited to: barns, sheds, silos, milk houses, coops, etc.

KK. Depreciation Schedules: The depreciation schedules or methods Contractor will use in determining the amount of depreciation shall reflect the normal and accepted depreciation rates of building according to classification. These schedules or methods shall cover residential, commercial, industrial and farm buildings, and shall be approved by the Assessor prior to their use by Contractor.

LL. Schedules for TOWN: Contractor will supply and leave for the TOWN not less than three copies of all the above required building cost schedules and depreciation schedules for the TOWN'S usage, one copy of which shall be turned over to the Assessor upon approval of the schedules, as outlined herein. The schedules shall be in the form of a bound manual and digital media.

APPRAISAL SPECIFICATIONS

MM. Appraisal of Land: Contractor will appraise all land within the TOWN: residential, vacant, commercial, industrial, agricultural, special use, and public utility.

Land and Value Study: Land shall be valued on the basis of an analysis of all sales data and related sales verification forms occurring during the two year period prior to December 31, 2015. The analysis and application of sales data shall be governed by procedures and techniques expressly approved by the Assessor.

Contractor shall make a careful investigation of this data and shall consult owners, realtors, banks and other sources of information relative to sales of property within the TOWN. All factors affecting the final value of land shall be considered, such as: location, zoning, inland wetlands, topography, soil condition, size, shape, view, utilities, vacancy, amenities, etc.

Contractor shall meet with a local real estate advisory group as directed by the Assessor to review land valuation issues.

Non-conforming uses and zoning variances shall be considered in establishing values. A brief description of each lot or parcel of land, together with the valuation computations, shall be entered on the field record card.

Land Value Inspection: Contractor will make a physical inspection of those that had sold or received a building permit during the last 12 months, and make necessary adjustments in value to compensate for topographical irregularities such as high banks, steep slopes, swamps, irregular shapes or anything else which may detract from the usefulness of the land. Non-conforming uses and zoning variances shall be considered in establishing values.

Land Value Units: Contractor will prepare land unit values, subject to the approval of the Assessor, by front foot, square foot, acreage or fractional acreage, or site value, whichever, in the judgment of the Assessor, most accurately reflects the market for the appraised land.

Land Value Map: Contractor will delineate the approved land value units on all streets and acreage in the TOWN on a suitable map to be provided by the TOWN. The land value map shall be returned to the TOWN prior to the completion of the revaluation contract.

Neighborhood Delineation: After consideration of the environmental, economic and social characteristics of the TOWN, Contractor will, with the cooperation and approval of the Assessor, delineate "neighborhood" units within the TOWN. Each neighborhood unit will, in Contractor's opinion, exhibit homogeneous characteristics. Each neighborhood unit will be assigned a separate identification code which will be used for valuation. These neighborhood numbers shall be recorded and maintained on street cards and the computer database.

NN. Appraisal of Residential Buildings and Structures:

Field Review: All properties shall be reviewed in the field by Contractor's personnel qualified as reviewers, as previously described in these specifications. The properties shall be reviewed for classification, correct listing of information, final value and to assure that they are correlated to comparable properties. The ASSESSOR shall be notified of the dates of reviewing and be entitled to accompany the reviewers during this phase of the revaluation. All properties shall have at least one drive by review by the appropriate personnel.

Digital Photos: A digital photograph shall be taken from the front and back of any newly constructed building to be imported into the approved CAMA system by parcel ID.

Full Measure and List: The Assessor reserves the right to direct the Contractor to perform a full measure and list of up to 50 residential parcels.

Pricing and Valuation:

Fair Market Value: Pricing and valuation of all land and buildings must reflect the fair market value as of December 31, 2015 in accordance with these specifications.

Final Valuation: The final valuation shall be the fair market value of the structure plus the market value of the land; such fair market values to be as approved by the Assessor. In arriving at the fair market value of the structures, replacement cost less depreciation from all causes may be considered, along with all other factors affecting the value of the property, all of which shall be noted on the street card.

OO. Appraisal of Commercial, Industrial, Public Utility and Special Purpose Properties:

General: All commercial, industrial, public utility and special purpose buildings shall be inspected, classified, priced and reviewed in the same manner as residential properties as set forth above, except that the dimensions of all buildings shall be to the nearest foot and the height of the building shall also be recorded on the street card.

Description: All buildings shall be identified and described as to component parts of construction, size, area, age, usage and present occupants(s) on the proper forms, as previously prescribed in these contract specifications.

Income Approach: Income and expense data gathered by the CONTRACTOR shall be utilized by Contractor for income producing properties. Any income and expense data, with accompanying summary reports and rent schedules, when used by Contractor shall become the property of the TOWN.

All income and expense data filed and furnished shall not be of public record and is not subject to the provisions of (Freedom of Information) of the Rhode Island General Statutes. From these returns and other data sources, Contractor will establish market or economic rent and expenses for income producing properties.

Contractor shall also develop capitalization rates by investigating sales and income data. Contractor shall establish rates for various classes of property which the TOWN may elect to have checked by bankers, investors and appraisers to ensure their accuracy. When the rates and methods have been approved by the Assessor, Contractor will perform the income approach by using both actual and economic income and expenses.

Yard Improvements: All yard improvements shall be listed and valued separately.

Fixed Equipment: All fixed machinery and equipment serving a building and taxable as real estate shall be listed within that building and priced in accordance with procedures as outlined in the applicable price schedule. If a question exists whether certain machinery or equipment is taxable as real estate, Contractor shall bring that question to the attention of the Assessor to be bound by her determination.

Public Utility Properties: Contractor is responsible for assessing all Utility Property including but not limited to: Electric & Gas Transmission Property, Railroad Property, and Telecommunication Property.

Review: A final review and inspection shall be made in the same manner and for the same purposes as prescribed for residential properties. The reviewer shall be competently trained and fully experienced in the appraisal of the particular type and kind of commercial, industrial, public utility or special purpose building for which he is responsible.

PP. Control and Quality Check:

Field Checks by Assessor: The Assessor shall spot check, in the field, properties picked at random, with or without Contractor's supervisor.

Building Permits: The Assessor shall screen and make available to Contractor all building permits or copies thereof issued during the course of the revaluation to determine that all new construction, additions and remodeling have been included in Contractor's appraisals.

Incomplete Construction: Contractor will plainly tab, with filing tabs approved by the Assessor, all property cards which have incomplete improvements on December 31, 2015. The street card shall show the percentage of completion and reflect the percentage of completion in the valuation as of that date.

RESPONSIBILITIES OF THE TOWN

QQ. Nature of Service: It is clearly understood and agreed that the services rendered by Contractor are in the nature of assistance to the Assessor and all decisions as to proper valuations, taxable or tax exempt, shall rest with the Assessor.

RR. Cooperation: The Assessor, TOWN and TOWN employees will cooperate with and render all reasonable assistance to Contractor and its employees.

SS. Items Furnished by the TOWN: The TOWN shall furnish or make available the following:

Maps: The TOWN shall furnish one set of updated TOWN tax maps showing street, property lines and parcel identification numbers.

Land Dimensions: The TOWN shall make available to Contractor lot sizes and total acreage of all pieces of property where the maps or present records fail to disclose measurements or acreage.

Zoning: TOWN shall make available current TOWN building zone regulations and zoning map.

Record Cards: The TOWN will make available the present street cards only for the copying by Contractor of the following data: owner of record, location of property, address of owner, deed references, map and lot reference, age and date of construction of all buildings, lot size or amount of acreage of properties.

Subdivisions of Land: The TOWN will make available to the CONTRACTOR periodic updates of all property transfers and land subdivisions.

Building Permits: The TOWN shall make available all building permits or copies thereof during the course of the revaluation project up to December 31, 2015. All building permits shall be returned to the TOWN.

Identification: The TOWN shall furnish letters or cards of introduction and authority to inspect real estate in the TOWN.

Signing of Communications: The TOWN shall sign, by the Assessor or Town Administrator, communications to be mailed at Contractor's expense for the purpose of contacting a property owner for inspection of the property and for the purpose of obtaining the property owner's income and expense information if such is needed for the income approach to value of commercial or industrial properties.

Mailing Address: The TOWN shall make available, through the Assessor's and/or Tax Collector's Office, the current mailing address of all property owners.

Office Space: The TOWN shall furnish to Contractor sufficient office space to carry out the terms of this contract. If the TOWN is unable to provide space, the TOWN will reimburse Contractor for leased space, subject to the Town's approval for appropriateness and cost.

Media: The TOWN shall have information above available on digital media for the purposes of creating a legal file on Contractor's computers during initiation.

Obligation to Keep Current: The TOWN shall continuously and currently update the information specified above.

Sales Information: The TOWN shall continuously and currently provide copies of all sales information available to it with respect to transfer of parcels.

TT. Training:

Amount of Training: Contractor shall provide a minimum of 12 hours of direct training to the TOWN assessment personnel, both during and after the completion of the contract, in the use of all aspects of the system.

Personnel: The Assessor shall determine the individuals and the amount of training each individual shall receive. If more than one person is receiving training at the same time, the training time shall be calculated as if one person is receiving training.

Location: All training shall take place on the TOWN's computer hardware within the TOWN, unless both the TOWN and Contractor agree to an alternate training site or computer hardware.

Documentation: Contractor shall provide two (2) copies of a detailed user manual for their CAMA software.

TRANSMITTAL OF RECORDS TO THE ASSESSOR

Regular periodical delivery of appraisals, as completed and in accordance to a schedule agreeable to the Assessor shall be turned over the Assessor for review. All preliminary appraisals of buildings, either completed or under construction and all completed and corrected records shall be turned over to the Assessor as of January 29, 2016. The final inspection and review shall take into consideration any known or apparent changes in the individual property since they were first inspected in order that the final appraisal of property shall be appraised as of December 31, 2015. Finalized valuations shall be turned over to the Assessor no later than April 15, 2016.

This information and/or appraisals and records shall not be made public until after the informal public hearings, except to the extent public access may be compulsory under the provisions of the applicable law.

It is understood and agreed that the reappraisal of properties covered by this agreement shall conform to the procedures and technical requirements of the Assessor, unless otherwise provided herein. Contractor, through its supervisor, shall be responsible to the Assessor and, at regular intervals, shall meet with said Assessor to discuss the progress and various other details of the project.

Weekly Progress Reports: Contractor shall provide a weekly progress report beginning with the commencement of the project and shall continue till the final delivery. These reports shall at the minimum provide a summary of the weeks activities, where data collectors have been and shall be in the coming week, percentage of project completed, and a reference to the time table as far as whether or not the project is on time.

Data Entry: must be done off-network and transferred to the in-house computer system. The system must be fully loaded with all assessment data before the reappraisal is completed. Conversion to the CAMA system must be completed no later than January 29, 2016. Any conversion is solely the Contractor's responsibility. All data entry will be the responsibility of the Contractor. The conversion must include all office notes, related documents, photographs, sketches and sketch notations, current fields of data, and history rolls.

Date: _____

I/We _____ the undersigned do hereby propose to furnish the Town of Lincoln, Rhode Island, in accordance with all terms and specifications contained herein:

1. Please attach your Proposal for each Option below:

OPTION 1 STATISTICAL REVALUATION as of December 31, 2015 of all real estate, exempt, land, buildings and improvements using the TOWN'S existing CRC CAMA appraisal system. Also including Final Valuation Information which will be available online via the existing CRC COMPANY website.

(Total Dollar Amount) _____

(Written Bid Proposal) _____

OPTION 2 STATISTICAL REVALUATION as of December 31, 2015 of all real estate, exempt, land, buildings and improvements, converted on COMPANY'S CAMA appraisal system. To also provide the COMPANY'S CAMA appraisal system and training for said system. Also including Final Valuation Information which will be available online via the COMPANY'S website.

(Total Dollar Amount) _____

(Written Bid Proposal) _____

NAME OF FIRM

SIGNATURE & TITLE

ADDRESS, TOWN, ZIP CODE

TELEPHONE NUMBER

FAX NUMBER

E-MAIL ADDRESS

NOTE:

On a separate attachment, or use the one provided, list the Officers of your Corporation or Principals of your LLC. Award can not be done without the attachment.

Also, please provide any literature you feel may be necessary.

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Complete Company Name	
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TOWN OF LINCOLN, RHODE ISLAND

NON-COLLUSIVE BID STATEMENT

All bidders are required to sign a Non-Collusive Statement with all public bids as follows:

1. The bid has been arrived at by the bidder independently and has been submitted without collusion with, and without any agreement, understanding, or planned common course of action with, any other vendor of materials, supplies, equipment, or services described in the Invitation to Bid, designed to limit independent bidding or competition,

And

2. The contents of the bid have not been communicated by the bidder or its employees or agents to any person not an employee or agent of the bidder or its surety on any bond furnished with the bid, and will not be communicated to any such person prior to the opening of the bid.

Signature

Printed Name

Title

Company